

Message Text

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SUBJECT: ENERGY: IEA/SLT REPORT ON GREECE

COPENHAGEN: PLEASE DELIVER TO MR.E.LYRTOFT PETERSEN AND
MR. V. JENSEN, MINISTRY OF FOREIGN AFFAIRS
ATHENS: PLEASE DELIVER TO MR. C. ARONIS, NATIONAL ENERGY
COUNCIL
OECD: PLEASE PASS TO MR. P. KELLY, IEA SECRETARIAT

UNCLASSIFIED

PAGE 02 STATE 044864

1) CHAIRMEN OF THE STANDING GROUP ON LONG-TERM COOPERATION,
CONSERVATION SUBGROUP, AND ACCELERATED DEVELOPMENT SUB-
GROUP, AND SECRETARIAT HAVE REVIEWED THE DRAFT REPORT ON
THE ENERGY PROGRAM AND POLICIES OF GREECE. PLEASE CONSIDER
THE APPROPRIATENESS OF RECOMMENDED CHANGES IN THE FINAL
REPORT. NORMALLY, FOLLOWING SUCH A REVIEW, THE REPORT
WOULD BE SENT ONLY TO THE RAPPORTEUR FOR CONSIDERATION
BEFORE BEING TRANSMITTED TO THE COUNTRY BEING REVIEWED.
DUE TO PRESSING TIME DEADLINES, WE DECIDED TO SEND OUR
COMMENTS SIMULTANEOUSLY TO THE RAPPORTEUR AND COUNTRY

EXAMINED. THE RAPPORTEUR, OF COURSE, RETAINS ULTIMATE EDITORIAL RESPONSIBILITY. THE DANISH RAPPORTEUR SHOULD ARRANGE A DISCUSSION (VIACABLE OR TELEPHONE) WITH THE GREEK DELEGATE BEFORE THE NEXT SLT MEETING OF FEBRUARY 28 - MARCH 1 AND COMMUNICATE THE FINAL VERSION TO THE SECRE-

TARIAT.

2) STANDING GROUP ON LONG TERM COOPERATION: REVIEW OF GREECE
RAPPORTEUR: E. LYRTOFT PETERSEN (DENMARK)

I. ENERGY POLICY OVERVIEW

NET OIL IMPORTS ARE PROJECTED TO INCREASE FROM 9.3 MTOE IN 1976 TO 14.5 MTOE IN 1985 AND 18.1 MTOE IN 1990. GREECE, WHICH GIVES PRIORITY TO RAPID ECONOMIC DEVELOPMENT, SHOWS AN EXPANSION IN TPE USE FROM 13.2 MTOE IN 1976 TO 25.3 MTOE IN 1985, WHILE THE TPE/GDP RATIO IS EXPECTED TO INCREASE FROM 1.11 IN 1976 TO 1.24 IN 1985

INDIGENOUS ENERGY SOURCES, PRINCIPALLY LIGNITE AND HYDRD, SHOW SUBSTANTIAL INCREASES OVER THE DECADE WHILE OIL AND UNCLASSIFIED

PAGE 03 STATE 044864

GAS PRODUCTION WILL BE INITIATED. CONSERVATION MEASURES ARE IN VARIOUS STAGES OF DEVELOPMENT AND IMPLEMENTATION.

THE NATIONAL ENERGY COUNCIL, IN CLOSE COORDINATION WITH RELEVANT MINISTRIES, HAS BEEN CHARGED WITH FORMULATING OVERALL ENERGY POLICY. POLICY PROPOSALS ARE REFERRED TO THE MINISTRY OF COORDINATION AND, IF NECESSARY, TO THE PARLIAMENT FOR ADOPTION. OTHER BODIES, PARTICULARLY THE MINISTRY OF INDUSTRY AND ENERGY, PUBLIC PETROLEUM CORPORATION, AND PUBLIC POWER CORPORATION ARE RESPONSIBLE FOR IMPLEMENTING POLICIES.

TWO GENERAL TARGETS HAVE BEEN APPROVED BY THE GOVERNMENT. THE FIRST IS THE REDUCTION IN TPE/GDP ELASTICITY TO 1.0 -1.1 BY 1985. PRIOR TO 1973, THE ENERGY ELASTICITY WAS 1.6. THIS TARGET REFLECTS THE ORDER OF PRIORITY BETWEEN GENERAL ECONOMIC POLICY AND ENERGY POLICY. THE SECOND GENERAL TARGET IS THE MINIMIZATION OF TOTAL SOCIAL COSTS OF ENERGY CONSUMPTION. THIS QUALITATIVE GOAL REPRESENTS ATTEMPTS TO HAVE ENERGY PRICES REFLECT LONG TERM MARGINAL COSTS, WHILE TAKING INTO ACCOUNT OTHER CONSIDERATIONS SUCH AS, MAXIMUM USE OF INDIGENOUS RESOURCES, PROTECTION OF THE ENVIRONMENT, AND FOREIGN CURRENCY SAVINGS.

II. MAJOR MEASURES IN PLACE

MAJOR CONSERVATION MEASURES IN PLACE ARE: REVIEW OF ALL

NEW INDUSTRIAL PROJECTS IN TERMS OF ENERGY CONSUMPTION, HIGH GASOLINE PRICES, PROGRESSIVE AND HIGH TAXES ON CARS, AND STRONG SUPPORT FOR PUBLIC TRANSPORT. IN THE RESIDENTIAL SECTOR, THERE IS A MANDATORY ANNUAL MAINTENANCE OF FUEL BOILERS.

ELECTRICITY TARIFFS ARE BEING READJUSTED ON THE BASIS OF MARGINAL REPLACEMENT COSTS.

UNCLASSIFIED

PAGE 04 STATE 044864

ALL NEW POWER STATIONS CONSTRUCTED THROUGH 1990 WILL BE BASED ON LIGNITE, HYDRO, OR NUCLEAR.

AT PRESENT THERE IS NO PRODUCTION OF OIL AND GAS. THE PUBLIC PETROLEUM CORPORATION IS IMPLEMENTING AN ACTIVE HYDROCARBON EXPLORATION POLICY. OIL PRODUCTION FROM DISCOVERED RECOVERABLE RESERVES WILL BEGIN IN 2-3 YEARS AND REACH A PEAK PRODUCTION OF 25,000 BARRELS A DAY. GAS HAS BEEN DISCOVERED BUT ITS HIGH HYDROGEN SULFIDE CONTENT MAKES IT DIFFICULT TO EXPLOIT.

OVER 90 PERCENT OF INDIGENOUS LIGNITE PRODUCTION IS USED FOR ELECTRICITY GENERATION. THE PUBLIC POWER CORPORATION (PPC) MINED 22 MILLION TONS IN 1976 AND EXPECTS PRODUCTION TO TOP 50 MILLION TONS BY 1985. ONLY 16 PERCENT OF HYDROPOWER POTENTIAL IS CURRENTLY BEING USED FOR ELECTRICITY GENERATION DUE TO THE FLOW AND STRUCTURE OF GREEK RIVERS. HYDROPOWER FOR PEAK LOAD DEMANDS ON ELECTRICITY WILL INCREASE IN STEP WITH LIGNITE BASE LOAD PLANTS. GREECE ALSO HAS SUBSTANTIAL RESERVES OF PEAT.

III. EVALUATION OF PROGRAM

1. OVERALL ENERGY POLICY OBJECTIVES

THE GENERAL TARGETS OF REDUCTION IN ENERGY ELECTRICITY AND MINIMIZATION OF TOTAL COSTS OF ENERGY CONSUMPTION ARE SUPPORTED BY NINE GENERAL MEANS FOR ATTAINING THE GOALS. THE TARGETS, AND SUPPORTING MEANS CONSTITUTE AN APPROPRIATE POINT OF DEPARTURE FOR GREECE'S ENERGY PLANNING. HOWEVER, THE TRANSLATION OF THESE MEANS INTO SPECIFIC PROGRAMS IS STILL AT A PRELIMINARY STAGE.

UNCLASSIFIED

PAGE 05 STATE 044864

PRICING POLICIES HAVE BEEN USED TO ENCOURAGE ENERGY CONSERVATION AND DEVELOPMENT OF ALTERNATIVE SOURCES OF ENERGY. ENERGY PRICES ARE GENERALLY AT WORLD MARKET LEVELS THROUGH THEY BARELY KEPT PACE WITH INFLATION OVER

THE LAST FEW MONTHS. ELECTRICITY TARIFFS ARE ARRANGED SO THAT THE MARGINAL KWH PRICE DOES NOT FALL BELOW AVERAGE COSTS AND STEPS TOWARD PRICING ON THE BASIS OF LONG RUN MARGINAL REPLACEMENT COSTS HAVE BEEN TAKEN IN THAT THE INTERNAL SHADOW PRICE OF LIGNITE IS ESTABLISHED AT 25 PERCENT ABOVE ACTUAL PRODUCTION COST.

2. ENERGY CONSERVATION

LAST YEAR'S SLT REVIEW COMMENTED THAT A CONSIDERABLE STRENGTHENING OF THE CONSERVATION PROGRAMME WAS BOTH POSSIBLE AND DESIRABLE. THROUGH RECENTLY IMPLEMENTED MEASURES, THE GREEK GOVERNMENT HAS DEMONSTRATED THAT IT IS FULLY AWARE OF THE IMPORTANCE OF A COMPREHENSIVE CONSERVATION PROGRAMME, BUT MUCH REMAINS TO BE DONE AS THE PROGRAMME IS IN THE "TAKE OFF" PHASE.

THE MOST SERIOUS IMPEDIMENTS FOR THE DEVELOPMENT OF GREEK CONSERVATION POLICY HAVE BEEN THE SHORTAGE OF PUBLIC FINANCING (1977: LESS THAN 0.001 PERCENT OF GOVERNMENT BUDGET) AND MANPOWER RESOURCES (1977: THREE FULL TIME STAFF PEOPLE). WITHIN THE FRAMEWORK OF A GENERAL REVISION OF THE GREEK ENERGY PLAN, A COMPREHENSIVE AND WELL-BALANCED CONSERVATION PROGRAMME SHOULD BE FORMULATED. FIRM COMMITMENTS OF THE GOVERNMENT TO CONSIDERABLE INCREASES IN DISBURSEMENTS FOR CONSERVATION PURPOSES WOULD GREATLY FACILITATE POLICY PLANNING AND ESPECIALLY IMPLEMENTATION.

(A) RESIDENTIAL/COMMERCIAL SECTOR

MOST MEASURES ARE ONLY AT A "NEAR" ADOPTION STAGE. THIS UNCLASSIFIED

PAGE 06 STATE 044864

IS TRUE FOR THE NEW BUILDING CODE AND TAX DEDUCTION FOR THE INSTALLATION OF DOMESTIC SOLAR WATER HEATERS.

EFFORTS IN IMPROVING APPLIANCE EFFICIENCY HAVE BEEN MADE, BUT ON A VOLUNTARY BASIS.

THE MOST SERIOUS SHORTCOMING IS THE ABSENCE OF FINANCIAL INCENTIVES TO ENCOURAGE RETROFITTING. STUDIES ARE UNDERWAY ON THIS SUBJECT BUT HAVE NOT YET BEEN CONVERTED TO SPECIFIC PROGRAMS.

WITH A STRENGTHENING OF CONSERVATION POLICIES IT WILL BE POSSIBLE TO REDUCE THE SIX PER CENT ANNUAL GROWTH RATE OF ENERGY CONSUMPTION PROJECTED FOR THE RESIDENTIAL SECTOR OVER THE NEXT DECADE.

(B) TRANSPORT SECTOR

THIS SECTOR SHOWS A GOOD CONSERVATION RECORD, MAINLY DUE TO HEAVY AND PROGRESSIVE TAXATION ON CARS AND SIGNIFICANT GASOLINE TAX, TOGETHER WITH REASONABLE SPEED LIMITS.

SEVERAL ACTIONS HAVE BEEN TAKEN TO IMPROVE PUBLIC TRANSPORTATION. ENERGY SAVING IN THIS FIELD IS POSSIBLE

THOUGH SOMEWHAT LIMITED DUE TO THE LOW PERCENTAGE OF POPULATION WHO OWN AUTOMOBILES, (50 AUTOS PER ONE THOUSAND POPULATION)

(C) INDUSTRIAL SECTOR

IN VIEW OF ITS 42 SHARE OF TFC AND AN EXPECTED GROWTH RATE OF 8.8 P.A., THE INDUSTRIAL SECTOR CERTAINLY HAS UNCLASSIFIED

PAGE 07 STATE 044864

THE HIGHEST ENERGY SAVING POTENTIAL.

CURRENTLY, THE ABSENCE OF A FINANCIAL ASSISTANCE/SOFT LOAN PROGRAMME, FOR THE INTRODUCTION TO NEW ENERGY SAVING TECHNOLOGY AND EQUIPMENT, MUST BE CONSIDERED AS AN IMPEDIMENT TO A MORE EFFICIENT CONSERVATION POLICY WITHIN THE INDUSTRIAL SECTOR.

3. FUEL SUBSTITUTION

FUEL SWITCHING FROM OIL TO INDIGENOUS LIGNITE FOR ELECTRICITY GENERATION IS THE MOST IMPRESSIVE FEATURE IN GREEK ENERGY POLICY. IN 1973, THE FUEL MIX WAS 46 PER CENT OIL AND 38 PER CENT LIGNITE, WITH THE BALANCE PROVIDED BY HYDRO. THIS RATIO HAS CHANGED TO 32/57 IN 1976 AND 1985 IT IS EXPECTED TO REACH 24/65.

THERE IS ALSO A PLANNED DOUBLING OF HYDRO POWER CAPACITY UP TO THE MID-1980'S SO THAT HYDRO POWER'S SHARE OF TOTAL ELECTRICITY GENERATION WILL INCREASE SLIGHTLY. NO NEW OIL-FIRED UNITS WILL BE PERMITTED AND RESTRICTIONS WILL BE IMPOSED ON THE OPERATION OF EXISTING ONES.

DUE TO CLIMATIC, GEOGRAPHIC AND ECONOMIC CONDITIONS THERE IS MINIMAL OPPORTUNITY FOR DISTRICT HEATING IN GREECE. POSSIBILITIES FOR COMBINED REDUCTION OF HEAT AND ELECTRICITY IN INDUSTRY SHOULD BE EXPLOITED TO A LARGER EXTENT.

EXPECTED FUTURE GAS PRODUCTION WILL BE USED BY INDUSTRY PARTICULARLY PETRO-CHEMICALS.

4. ENHANCED DOMESTIC PRODUCTION

DOMESTIC LIGNITE PRODUCTION IS EXPECTED NEARLY TO TRIPLE

THROUGH THE LATE 1980'S FROM THE PRESENT LEVEL OF 3
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PAGE 08 STATE 044864

MTOE. ALMOST ALL LIGNITE WILL BE USED IN POWER STATIONS.

GREECE EXPECTS TO HAVE ITS FIRST NUCLEAR POWER STATION
OF 600-800 MW IN OPERATION BY 1987 AND ESTIMATES THAT
TWO ADDITIONAL NUCLEAR POWER STATIONS WILL BE IN OPERA-

TION BY 1990. BY 1990 NUCLEAR IS EXPECTED TO CONTRIBUTE
3 MTOE TO ENERGY SUPPLY (ABOUT 9 PER CENT OF TPE).
FOLLOWING A RECENT GOVERNMENT ANNOUNCEMENT TO PROCEED
WITH NUCLEAR PLANS, SOME PUBLIC OPPOSITION WAS EVIDENCED,
BUT IS NOT VIEWED AS A MAJOR CONSTRAINT. SPECIFIC STEPS
TO BE FOLLOWED INCLUDE SITE SELECTION, AND FORMULATION OF
SECURITY REGULATIONS FOR CONSTRUCTION AND OPERATION.

TEMPORARY STORAGE OF WASTE MATERIAL CAN BE HANDLED IN
GREECE, BUT PERMANENT DISPOSAL OF WASTE MATERIAL COULD
EVOLVE INTO A MAJOR CONSTRAINT.

DOMESTIC OIL AND GAS PRODUCTION FORECASTS SUBMITTED IN
THE BALANCE SHEETS ARE REASONABLY CERTAIN. GREEK
OFFICIALS HAVE EXPRESSED THE VIEW THAT PRODUCTION IN
1980'S COULD BE MUCH HIGHER THAN THE LEVEL OF 1-1.5 MTOE
FORECASTED IN THE MOST RECENT ENERGY BALANCE SUBMITTED
TO THE IEA.

EXTENSIVE EXPLORATORY DRILLING WILL BE REQUIRED TO ARRIVE
AT A BETTER ESTIMATE OF THE RESOURCE BASE.

5. FALLBACK STRATEGY

LITTLE IS BEING DONE TO DEVELOP A FALLBACK STRATEGY.
MAJOR ELEMENTS OF FALLBACK STRATEGIES OPEN TO GREECE
INCLUDE:
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PAGE 09 STATE 044864

-- A CONSIDERABLE STRENGTHENING OF THE CONSERVATION
PROGRAMME,

-- AN ACCELERATED UTILIZATION OF LIGNITE FOR ELECTRICITY
GENERATION AND POSSIBLY FOR DIRECT THERMAL USE IN
INDUSTRY. AS LIGNITE RESERVES ARE DEPLETED, THIS
STRATEGY COULD BE SUPPLEMENTED THROUGH INCREASED USE
OF IMPORTED STEAM COAL.

6. ACHIEVABILITY OF ENERGY BALANCES PROJECTED

EVALUATION OF THE DEMAND FORECAST AND RECENT DEMAND

TRENDS SUGGESTS THAT THE PROJECTED GROWTH RATE IN ENERGY DEMANDS ARE REALISTIC IF ANTICIPATED GDP GROWTH RATES ARE ACHIEVED. THE REDUCTION IN THE ENERGY ELASTICITY FROM RECENT LEVELS OF 1.6 TO ABOUT 1.0 BY 1990 THUS APPEARS ATTAINABLE.

THE GREEK GOVERNMENT HAS COMMITTED ITSELF TO INTRODUCE IMPORTANT CONSERVATION MEASURES IN THE RESIDENTIAL/ COMMERCIAL AND INDUSTRIAL SECTORS, WHICH ARE NOT TAKEN FULLY INTO CONSIDERATION IN PRESENT ENERGY BALANCES. THESE MEASURES CAN BE EXPECTED TO HAVE A SIGNIFICANT DOWNWARD IMPACT ON ENERGY DEMANDS.

THE INCREASE IN THE ENERGY DEMAND OF THE TRANSPORTATION SECTOR SEEMS TO BE SOMEWHAT UNDER-ESTIMATED. SO IT IS DIFFICULT TO PREDICT THE NET IM,ACT ON TOTAL ENERGY DEMAND.

ON THE SUPPLY SIDE MOST PROJECTIONS (LIGNITE, HYDRO-CARBONS, AND HYDRO) ARE ACHIEVABLE. IT MAY BE POSSIBLE TO HAVE ONE NUCLEAR POWER PLANT BY THE LATE 80'S GIVEN THE PRESENT STATE OF PROGRESS. BUT THE TARGET OF 2200 MW BY 1990 IS SOMEWHAT OPTIMISTIC.

UNCLASSIFIED

PAGE 10 STATE 044864

7. ADEQUACY OF EFFORTS

DUE TO THE COUNTRY'S ECONOMIC DEVELOPMENT POLICIES, GREECE IS ONE OF THE FEW IEA COUNTRIES THAT EXPLICITLY PLAN FOR A SUBSTANTIAL ABSOLUTE INCREASE IN OIL IMPORTS UP TO 1990. THROUGH INCREASED RELIANCE ON INDIGENOUS

ENERGY SOURCES GREECE WILL AT THE SAME TIME REDUCE CONSIDERABLY THE RELATIVE DEPENDENCE ON IMPORTED OIL. IF THE MEASURES IN CONSERVATION NOW BEING PREPARED ARE IMPLEMENTED, GREECE WILL MAKE AN ADEQUATE CONTRIBUTION TO THE FULFILLMENT OF THE GROUP TARGET.

IV. POLICY RECOMMENDATIONS

(A) OVERALL ENERGY POLICY OBJECTIVES

-- ELABORATE THE 1976 ENERGY PLAN INTO A LONG-RANGE PLAN WITH A SET OF SPECIFIC PROGRAMS SUPPORTED BY TARGETS AND SCHEDULES FOR ACHIEVEMENT. SUCH AN ENERGY PLAN SHOULD BE COMPLETED AND RECEIVE THE NECESSARY GOVERNMENT APPROVAL BY THE END OF 1979;

-- STRENGTHEN THE MINISTERIAL STRUCTURE AND MECHANISM FOR ENERGY POLICY PROGRAM IMPLEMENTATION;

(B) ENERGY CONSERVATION

GENERAL

-- INCREASE SUBSTANTIALLY ALLOCATIONS FROM THE PUBLIC BUDGETS FOR CONSERVATION PURPOSES. SUCH BUDGET UNCLASSIFIED

PAGE 11 STATE 044864

INCREASES SHOULD COVER LONG-TERM FINANCING TO ESTABLISH THE FOUNDATION FOR IMPLEMENTATION OF AN EFFECTIVE CONSERVATION PROGRAM;

RESIDENTIAL/COMMERCIAL

-- ENACT THE NEW BUILDING CODE WITH MANDATORY INSULATION STANDARDS FOR ALL NEW BUILDINGS PROMPTLY;

-- ENSURE THAT THE ANNOUNCED DECREE ON MANDATORY MAINTENANCE OF BOILERS AND BURNERS IS IMPLEMENTED EFFICIENTLY AND MAKE A FOLLOW-UP STUDY ON THE IMPACT OF THE PROGRAMME;

-- DESIGN AND INTRODUCE A GRANT/SOFT LOAN PROGRAMME FOR RETROFITTING OF EXISTING HOUSES;

-- STRENGTHEN INFORMATION/EDUCATION/MOTIVATION CAMPAIGNS TO PROMOTE EFFICIENT ENERGY USE;

TRANSPORT

-- DEVOTE MORE RESOURCES TO PUBLIC TRANSPORT TO INCREASE ITS ATTRACTIVENESS AND THEREBY ITS MARKET SHARE.

INDUSTRY

-- RAPID IMPLEMENTATION OF THE GOVERNMENT-APPROVED GRANT PROGRAMME OF 100 MILL. US\$ IN 5 YEARS FOR ENERGY-SAVING INVESTMENTS IN INDUSTRY;

-- EXPAND ENERGY AUDITING SCHEMES AND CONSULTING SERVICES;

-- CONTINUE SCRUTINY OF NEW ENERGY-INTENSIVE INVESTMENTS IN INDUSTRY;
UNCLASSIFIED

PAGE 12 STATE 044864

ENERGY SECTOR

-- CONSIDER THE POSSIBILITY OF FINANCIAL INCENTIVES FOR COMBINED PRODUCTION OF POWER AND HEAT;

FUEL SUBSTITUTION

-- PROVIDE THE NECESSARY FINANCIAL SUPPORT THROUGH INCREASED ELECTRICITY TARIFF RATES, AS NECESSARY, TO IMPLEMENT THE PUBLIC POWER CORPORATION'S PLANS FOR SWITCHING FROM OIL TO LIGNITE;

-- BEGIN GRADUAL PHASING IN OF IMPORTED STEAM COAL AS LIGNITE RESOURCES ARE DEPLETED.

(C) ACCELERATED DEVELOPMENT

OIL AND GAS

-- AS A CLEARLY DEFINED RESOURCE BASE IS ESSENTIAL FOR RATIONAL ENERGY PLANNING AND PRODUCTION POLICY, THE PUBLIC PETROLEUM CORPORATION SHOULD EXPAND AND ACCELERATE ITS EXPLORATION PROGRAM FOR OIL AND NATURAL GAS.

-- ESTABLISH A PRICING POLICY FOR NATURAL GAS TO ENCOURAGE NECESSARY INVESTMENT IN PRODUCTION AND INFRA-STRUCTURE FOR DELIVERY AND UTILIZATION;
"TRUCTURE THE OIL MARKET IN SUCH A WAY TO ENSURE FULL PRODUCT PRICES ARE PAID BY END USERS;

SOLID FUELS UNCLASSIFIED

PAGE 13 STATE 044864

-- STEAM COAL IMPORTS SHOULD BE INTRODUCED IN A TIMELY FASHION AS LIGNITE RESERVES ARE DEPLETED;

UNCLASSIFIED

-- -PEAT PRODUCTION POSSIBILITIES, CONSIDERING PROVEN RESERVE LEVELS, SHOULD ALSO BE REVIEWED;

-- IN-SITU LIGNITE GASIFICATION SHOULD BE CONSIDERED;

NUCLEAR

-- THE LEGAL REGIME REGARDING NUCLEAR POWER SHOULD BE PROMPTLY DEFINED AND NEGOTIATIONS WITH SUPPLIERS OF SERVICES AND EQUIPMENT UNDERTAKEN TO ENSURE THAT NUCLEAR POWER WILL BE AVAILABLE IN THE LATE 80'S;

RENEWABLES

-- ENACT RAPIDLY THE TAX DEDUCTION LEGISLATION FOR INSTALLING DOMESTIC SOLAR WATER HEATERS AND, IF NECESSARY, PROVIDE FINANCIAL SUPPORT TO HELP FIRMS DEVELOP THEIR PRODUCTION CAPACITY. VANCE

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